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ABSTRACT

Policies and procedures for developing a successful school volunteer program within Catholic schools are presented in this booklet. Chapter 1 describes the philosophy of a volunteer support program, which stresses the importance of volunteer involvement for developing schools as functional communities. Chapter 2 presents reasons why volunteers are both important and endangered and examines the role of the volunteer coordinator. Strategies for identifying volunteers, advertising opportunities, and approaching volunteers are outlined in the next two chapters. Guidelines for delegating responsibility and designing uniform professional procedures are provided in chapters 5 and 6. Chapter 7 highlights stewardship and accountability practices, and chapter 8 describes components of a volunteer education program--orientation, inservice training, and recognition. Administrator checklists for the principal and volunteer coordinator roles are presented in the final chapter. Appendices include time-in-lieu-of payment policies, a checklist for a volunteer orientation, sample content for a volunteer handbook, a committee budget grid, and an inservice program on planning and development. (6 references) (LMI)

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Catholic Schools and Volunteers: A Planned Involvement

by Janis E. Tedesco

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About the Author

Janis Tedesco has been an active volunteer in Catholic schools since 1980. She has served on committees and boards on both the elementary and secondary levels in numerous areas, including curriculum enrichment, long-range planning, marketing and development. She has also worked with parish councils in formulating mission and case statements, and in organizing planned giving and sacrificial giving campaigns.

Currently, Mrs. Tedesco is directing a capital campaign for the Cathedral of Our Lady of Lourdes in Spokane, Washington, and consults with schools in the Spokane Diocese on grant writing, volunteer training, the designing of board and committee structures, and technical and professional writing.

Mrs. Tedesco has a Bachelor of Arts in History from Seattle University and a Masters of Arts in English from Gonzaga University, and is working on her doctoral dissertation in English literature at Washington State University. Her work has been published in *Momentum, Church, Today's Catholic Teacher, Catholic School Management Letter, Rhetoric Review, Western Humanities Review* and The University Press of America.

Foreword

In *Catholic Schools and Volunteers: A Planned Involvement*, Janis Tedesco clearly presents policies and procedures to ensure a successful and dynamic school volunteer program. Her understanding of what she recommends comes from three sources: many years of volunteer experience in Catholic schools; training and research in school development, long-range planning and group process skills; and experience as a consultant to principals, pastors, development directors and school board members. Mrs. Tedesco's personal convictions about the importance of Catholic schools and her commitment to schools as faith communities guide her approach in the text.

The strength of a school's development program depends on both the school's administrative leadership and its volunteer leadership. Catholic school principals who succeed in development build on the expertise of volunteers. This publication offers practical ways to enhance the involvement of volunteers in a school.

I wish to thank the following critical reviewers of this publication for their assistance: Brian Boston, NCEA Secondary School Department; Ruth Urbancic, a volunteer for both an inner-city Catholic elementary school and a suburban Catholic high school in Baltimore, MD; Linda Herndon, Special Events Coordinator of St. Mary's Academy in Portland, OR; Sister Katherine Franchett, Director of Billings Catholic Schools in Billings, MT; Eugene M. Kail, President of Eugene M. Kail and Associates in Pittsburgh, PA; and Sister Kathleen Collins, Associate Executive Director, NCEA Elementary School Department.

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In developing this material, I have enjoyed the privilege of working with many school communities in the Spokane Diocese. I extend thanks to Michael Trudeau; Sister Marcia O'Neill Schrapps, SNJM; Mark Perrier; Joanne McCann; Carmen Himanez; Carol Speltz; Sister Loretta Giampietri, FSPA; Father Tom Royce, SJ; and Father James Ribble for their cooperation and, more importantly, for their concern for supporting, training and appreciating volunteers in their schools and parishes. I would also like to thank Sister Maureen Oliver, SNJM, of St. Ignatius School in Portland, Oregon, and Donna Ryan and Debbie Hansen of Gonzaga Prep in Spokane, for their help in identifying the particular concerns of their institutions.

Finally, I give special thanks to Eric Meisjford and Bridget Carstens for their editorial assistance.

I. The Philosophy of a Volunteer Support Program

Four years ago James Coleman, a sociologist from the University of Chicago, published *Public and Private High Schools: the Impact of Community*, a study that compared the achievement record of American public and private high schools.[1] According to this report, Catholic schools are doing an excellent job in preparing their students for college and beyond. The good news goes even further: The drop-out rate for private high schools is 3.4% overall and does not change when isolating students from high-risk populations. In public high schools, the average drop-out rate is 14.3%; this figure doubles in the case of high-risk students.

In his search for an explanation, Coleman describes what he calls "value" and "functional communities." In private schools, administrators, teachers and parents share the same values. In Catholic schools, they not only share the same values but also enjoy bonds of faith and friendship that are engendered initially in the parish and carried over to the school. The resulting "functional community" acts as an extended family for all members, a particularly important feature in the lives of children who come from disadvantaged or dysfunctional family conditions. Furthermore, Coleman concludes that when parents are directly involved in their children's education, the quality of that education is improved significantly.

What Coleman describes as "functional communities" are what the American bishops call "faith communities." According to the bishops, "Catholic schools which realize the three-fold purpose of Christian education—to teach doctrine, to build community, and to serve—are the most effective means available to the Church for the education

of children and young people...."[2] The Catholic school provides a cultural, social, moral and spiritual link or continuum between the family, the Church and society. Perhaps this is why Pope John Paul II states in his apostolic exhortation *On the Family*, "The renewal of the Catholic school must give special attention to both the parents of the pupils and to the formation of a perfect educating community."[3]

Whether we speak of a functional community, a faith community or a perfect educating community, what we are describing is one result of involving volunteers in Catholic schools. We should not assume, however, that we are defining a simple cause and effect relationship. How volunteers are supported, trained and appreciated reflects the values of the communities they serve. Early Christians were remarkable for one thing: "See how they love one another." It is the fundamental premise of this book that our philosophy and mission statements are tested first and foremost by how we treat each other—this includes paid and volunteer staff as well as students. More importantly, Catholic schools will be able to realize their mission of message, community and service only if they encourage and support volunteerism. If Coleman is correct, the ability of schools to become functional communities and to provide quality academic programs depends in part on volunteer involvement.

Chapter II deals with the reasons why volunteers are at once important and endangered. The following chapters attempt to identify and suggest solutions to some of the critical concerns shared by elementary and secondary schools: identifying, attracting, training, supporting and appreciating volunteers. In many ways, the practical suggestions develop from the initial premise that volunteerism is a gift of self and, therefore, volunteers must be numbered among our most important donors. Also underlying this approach is the belief that the talents and wisdom of parents, grandparents, alumni, parishioners and friends involved in schools can only improve and enhance the evangelical and educational efforts of their communities. Therefore, volunteers are not sources of free labor who assume tasks deemed odious by paid staff, or providers of unskilled or inconsequential activity.

For a variety of reasons, the distinction between "professionals" and "volunteers" is rapidly collapsing. The demands on volunteers are becoming increasingly sophisticated and

specialized as boards assume more planning and marketing responsibilities, and development programs succeed in raising significant amounts of money through annual funds, endowments and planned giving efforts. Volunteers bring important and abundant skills from the work place. Schools need a large volunteer force that is conversant and accomplished in technical and professional skills.

A well-designed volunteer program utilizes a variety of talent and provides the planning and organization that brings the best results. All too often, however, we find a lawyer flipping pancakes or a writer raking leaves. We also see volunteers unnecessarily pressured because they are thrown into tasks without training or rendered ineffective due to a lack of planning or organization. Such occurrences are more than lamentable and short-sighted—they are a violation of our mission as Catholic schools. In these days when schools must witness to the mandates of faith, community and service, volunteerism is a critical and evident index of how well we are doing our job to "love one another."

This book is designed to provide the theory of a development model of volunteer support, as well as a detailed, practical plan of action. Not every suggestion will be appropriate for every Catholic school. Not every school community will be able to implement all the ideas that seem appealing. It may be wise to approach this program from a strategic standpoint, incorporating specific goals on a year-by-year basis. For instance, the first year could be dedicated to reorganizing committee structures under the guidance of the volunteer coordinator. The second year could mark the initiation of a new computer-based volunteer tracking system. In the third year, the school could give its first orientation for volunteers. Opportunities for volunteer training in the community could be extended in the fourth year. Finally, the school could evaluate its program in the fifth year to fine-tune and improve it.

Every Catholic school is unique, and every community has a special profile. The challenge for each Catholic school is to identify its specific needs and then to meet these needs by expanding its base of support through volunteer involvement and commitment.

II. The Case for a Planned Approach

Volunteers Are a Critical Resource

The contribution of volunteers to Catholic schools is incalculable. By providing examples of charity and service for students, volunteers witness to the Gospel message. As they work with parents, alumni, teachers and administrators, volunteers form friendships and, thereby, build community. Volunteers supplement formal instruction and enrich the students' academic experience. Volunteer involvement also helps to stabilize the operating budget, recruit new families and retain current ones, project a positive image, and ensure a broad base of support for development and fund-raising projects. Many volunteers also contribute financially to the school. Frequently volunteers increase their financial support as they become more familiar with the school and take on greater leadership roles.

Anyone who gives their time, talent, or dollars is a donor to the school. Volunteers donating their time and talent to the school deserve all the communication, recognition and support that financial donors receive.

Many schools have extended their volunteer base beyond parents. The addition of grandparents, parishioners, alumni, parents of alumni, and friends to the volunteer ranks shows students that members of the wider faith community are concerned for and involved with their education and their future. A diversified volunteer staff broadens the school's influence, enhances its sense of community, and strengthens the school's image.

Volunteerism is not just a giving activity. While volunteers enhance the expression of the school's mission, they

receive a great deal in return. For parishioners, the school provides a way to continue and deepen friendships established through parish activities. For new families, volunteer involvement is one of the initial ways they meet people within the parish and school. For alumni, volunteering helps maintain important ties with former friends and their own educational heritage. For grandparents, volunteer activities enable them to remain closely involved in the lives of their grandchildren. By becoming involved in their children's education, parent volunteers fulfill both their educational and evangelical mission as parents and as believers.

Volunteerism provides the opportunity for a mutually beneficial relationship between the volunteer and the school. By giving time and talent, volunteers help the school to realize its mission and goals in all major areas (development, finance, curriculum, public relations, recruitment, etc.). In exchange, the school extends to the volunteer the privilege of being involved, belonging, and serving.[4]

The Volunteer Crossroads

Today, the many demands on people's time makes building a broad base of volunteers more difficult than in the past. Administrators face a variety of realities:

1. a lack of volunteers
2. the same volunteers doing the same things
3. active volunteers that are overburdened

In addition, there are internal concerns such as

1. inadequate communication between volunteers, board members and administrators
2. an inadequate sense of teamwork
3. confusion about the chain of command
4. negative discussion passed through the grapevine when problems arise

The key to addressing these challenges effectively is identifying their causal factors, a search that will highlight changing socioeconomic and demographic patterns, as well as the needs of volunteers.

Since the 1960s, when Catholic school enrollment reached

an all-time high, demographics and family structures have changed dramatically. Often, there are fewer families with children in areas where Catholic schools presently exist. There are also more single-parent families and more families with two working parents. This does not mean that adults are not capable of volunteering. It does mean, however, that volunteers have less time to give, that schools will be competing against other institutions for volunteers' commitment, that on-site time during school hours may not be possible for many volunteers, and that meeting times need to be more flexible to accommodate work schedules and family demands.

Even more importantly, the demands placed on volunteers have changed significantly over the past five years. Previously, the tasks included supervising playgrounds at lunchtime, taking turns for story hours in the library, driving for field trips, presenting information in a class, chaperoning a dance, providing tutoring support and selling raffle tickets for fund-raisers.

Volunteers still perform these important duties, but in addition to these activities, they are responsible now for running annual giving campaigns; directing marketing programs; monitoring endowment funds; producing newsletters, case statements and annual reports; educating publics about planned giving opportunities; and writing policies. Schools are demanding sophisticated skills and professional performances from volunteers.

Planning and development programs play an essential role in the revitalization of Catholic schools as communities, educational institutions and financial entities. In many places, the formulation of tactics to support the volunteers responsible for these programs has not kept pace with the implementation of these programs. New volunteers need to be educated in the total planning process to understand how all the parts fit into the whole. With a clearly established training process, the new volunteer will find the amount of work manageable and will comprehend how a particular responsibility is connected to the larger picture.

Catholic schools must not only continue to implement planning and development programs but also increase their publics' sense of ownership in these programs. Such goals require planning—planning that deals with the symptoms, the factors that produce those symptoms and the solutions. Such goals also require a comprehensive approach to the re-

cruitment, orientation, support and recognition of volunteers.

The Volunteer Coordinator

When a school's administration chooses to embark on a planned volunteer support program, the first issue to be addressed is: Who will be responsible for such a program? Certainly, principals do not have the time. It is not their job, and coordinating volunteers is not more important than staffing, curriculum, long-range planning or development. The best approach is to create a "coordinator of volunteers" position. This coordinator would assume the responsibility of overseeing a support program designed to meet both the needs of the school and the volunteers.

Who might that person be? There are several possibilities. If the school has a paid development director on staff, that person might be able to oversee a volunteer support program. The director comes in continual contact with a variety of chairpersons and committee members who are closely involved with the specialized, skilled tasks of planning and development (See ***How to Hire a Development Officer*** by Jack Peterson [NCEA, 1990] for a suggested job description). The development director also possesses a comprehensive view of the planning process, which many volunteers lack. In monitoring progress, the director can observe how work should be more evenly distributed and give positive support to volunteers for jobs done well.

Designating the development director as the coordinator of a volunteer support program, however, may not work for every school. It may take the director away from the research, proposal preparation and solicitation appointments essential to the school's financial support. Instead of acting as a coordinator, the development director could serve as an occasional resource for the volunteers. The success of such an approach depends upon the working relationship between the director and the volunteers, the depth and expertise of the volunteer base, the present and future goals of the school's development program, and how often the director is requested to be a resource.

Another option might be to fill the coordinator position with someone already involved as a volunteer. In this case, the school might consider offering the position as service-in-lieu-of-tuition, in light of the responsibility and time commitment that would be involved. Frequently this

approach to staffing the position leads to a paid job as the work load increases. Whether or not the coordinator should be paid is a decision that will depend on factors such as the coordinator's time commitment and the school's financial resources.

If the school desires to establish the new position within the existing framework of committee structures, the duty could be assigned to an officer of the school policy board.

Any of these plans require clear communication between the principal and the volunteer coordinator. The organizational flowchart would include the new position in the existing chain of command.

Once the school secures a volunteer coordinator, it can more consistently and capably recruit, train and support volunteers.

III. Identifying and Advertising Opportunities

Through research, a school can increase the number and services of volunteers. Research will reveal such information as the availability of potential volunteers, their skills and interests, and what expertise they can bring to the school community to meet the defined needs of the school. The process begins by asking the appropriate questions.

What Do Schools Need to Know about Potential Volunteers?

For parents, the school needs several basic pieces of information. The school should know who is raising a family as a single parent; who the primary care giver is; and, of its two-parent families, which parents are working outside the home in a part-time or full-time job. In addition to students enrolled in the school, the school should find out the ages of other children in the family to get an indication of the activities that already demand the parents' time. The school should also find out the occupational title as well as the place of employment for each working parent; this information will provide the most helpful guide to effective use of volunteers. Parents' volunteer experience and hobbies will indicate their skill capabilities, interests and availability. For secondary schools, the parent profile should contain additional information. Careful research on the volunteer experience of new parents will determine in what ways they were involved on the elementary school level. If new parents bring needed expertise, the school should approach these parents with specific requests for assistance.

The school can also apply these same questions to both

parishioners and alumni. The parish's census data and the school's alumni association information contain similar helpful information. Research should focus on time demands, family responsibilities, job and volunteer experience, and availability.

When Can the School Ask for This Information?

In the case of parents, school registration is the ideal time for collecting this information, since none of these questions are personal and they should already be included on registration forms. The school collects, processes and tracks this information in order to identify, recruit and train volunteers. If additional information is required, parent-teacher conference time can be used to complete the research.

In the case of grandparents, there are two easy ways of soliciting information. During grandparent days held at the school, a school representative (the principal, the volunteer coordinator or a board member) asks grandparents to volunteer or requests that they fill out a brief informational form. Another alternative is to ask parents for information on grandparents. During the yearly updating of the school's newsletter mailing list, parents could specify the addresses, phone numbers, occupations and interests of grandparents.

Many parishes seek new volunteers on a yearly basis for their various ministries: ministers of the word, visitation ministers, Eucharistic ministers, members of the telephone committee and other positions. The parish might agree to advertise the volunteer needs of the school at the same time.

The school's quarterly newsletter and/or alumni newsletter can request information about graduates. Alumni reunions provide an excellent opportunity for personal contact with former students. From these sources, the school can compile the current occupations and activities of alumni.

How Should the School Use This Information?

The principal and the volunteer coordinator can study the information to identify potential volunteers from parents, alumni, parishioners and grandparents. Volunteers other than parents can add a new richness to the school's program by bringing with them a sense of tradition, firsthand knowledge of the past, and a perspective that transcends present circumstances and concerns.

Having an adequate computer data base will help schools use and track the data, and prove essential for an efficient volunteer support program. The collected data might well indicate that a number of people are willing and able to volunteer their time. If people are not involved in the school, then school leaders need to ask themselves if they have done an adequate job in advertising volunteer opportunities, making people feel welcome and needed, and showing them appreciation. After leaders apply the insights gained by asking these questions, their research activity leads to matching volunteers to tasks in a timely manner.

Timeline for Gathering and Coordinating Information

In most schools, registration occurs during the spring. If leaders advertise that volunteers are needed and ask parents to sign up for different jobs when they register their children, the school can prepare for the coming year ahead of time and operate in full swing by September.

Scheduling a volunteer sign-up at registration entails more than typing out a list of jobs. Advertising volunteer opportunities should include an accurate description of job demands in terms of skills, training and time commitment. If the volunteer sign-up will happen at registration, the following timeline may be helpful:

- **Nine weeks before registration**

  The volunteer coordinator asks committee chairpersons for a short description of the committee's goals and responsibilities for next year. Because committee chairpersons know their jobs better than anyone, they can best describe their needs and estimate the number of committee members needed and the time commitment required.

- **Seven weeks before registration**

  The volunteer coordinator prepares the first draft of a booklet for volunteers based on information from committee chairpersons. The volunteer coordinator meets with the principal about the booklet's content.

- **Four weeks before registration**

  The volunteer coordinator circulates a mock-up of the booklet to committee chairpersons for proofing and approval.

- **Three weeks before registration**
  The booklet is printed or photocopied.

- **One week before registration**
  The school distributes the booklet to school families for consideration. Even if other registration forms are not mailed beforehand, this courtesy allows parents the opportunity to consider their volunteer commitment thoughtfully before registration takes place.

  Concurrent announcements should appear in the parish bulletin and the school/alumni newsletter, inviting parishioners, alumni and friends to contact the school during its volunteer drive. To complete the recruitment efforts, a grandparents day can be scheduled within a week or two of registration that features a special appreciation ceremony for past support and an invitation to be involved in the coming school year.

- **At registration**
  There should be a sign-up sheet that directly parallels the job opportunities listed in the booklet. Ideally, the volunteer coordinator will be present to answer any questions.

  Even for schools that expect or require a specific number of volunteer hours from parents, this process of advertising opportunities is critical, perhaps even more so than at schools which depend on freewill donations of time and talent. It is very easy for parents to feel trapped by time-in-lieu-of-payment policies (see Appendix A). For volunteers to be required to do a job that neither appeals to them nor uses their talents can instill in them a sense of being used or forced. Parents must never be taken for granted. Allowing volunteers to play a part in selecting the kind of contribution they make is an important feature in keeping ***caritas***, or "Christian community," in their experience and maintaining their enthusiasm.

- **After registration**
  Follow-up is absolutely necessary. Once volunteers indicate an interest, the school must take up the offer. If leaders computerize volunteer sign-ups, within two or three weeks (certainly before the end of May) they can distribute sign-up lists to committee chairpersons. These lists will include names, addresses and phone numbers as well as the identification of the volunteer as parent, parishioner, gradu-

ate, grandparent, parent of graduate, or friend. The volunteer coordinator's letter accompanies the lists, asking the chairperson to call the people, thank them for signing up, confirm their commitment and answer any questions. Once committee membership is firmed up for the coming year, chairpersons notify the volunteer coordinator, who updates the data base.

Registration sign-up guarantees that every parent has the opportunity to learn about the important functions of volunteers. During the follow-up phase, special attention should be paid to certain groups:

- **New families**

  A personal invitation needs to be extended to new families so that they are welcomed and encouraged to become involved.

- **Parents whose children have graduated from grade school**

  The elementary school should invite parents whose children have graduated to remain as volunteers in those areas where other people of comparable talent are not available to replace them.

- **Inactive families**

  Certain parents may have been faithful supporters in the past but now are inactive. Others may never have been involved as volunteers. The school needs to ascertain what problems prompt such responses, such as problems with a staff member or another parent, lack of recognition, a feeling of alienation or isolation, or even indifference.

Ensuring that volunteer opportunities are routinely and accurately advertised means that potential volunteers will be educated about the school's needs and understand the value of each individual volunteer commitment to the students' educational experience. Inviting people to volunteer is inviting them to participate fully in the community life of the school. By extending the invitation to participate to parents, grandparents, parishioners, friends, alumni and parents of alumni, the school builds a powerful, diversified volunteer program.

IV. Approaching Volunteers

Volunteers as Donors

For years, Catholic schools have taken great care to identify, know and appreciate people who financially support the school. Leaders need to apply the same development practices to their methods of approaching prospective volunteers. Furthermore, many who volunteer their time increase their financial support as they become more involved in the school.

Whether the person is a donor of dollars, time or both, the process includes the same steps:

1. researching the person's interests, past record of giving and potential for greater support
2. approaching him or her with a specific proposition relating those interests to school needs
3. discussing with the person what he or she would be most interested in supporting

The school needs to listen to volunteers; to understand what attracts them, what they are interested in and how much time they have; and to be flexible in its expectations and requests.

Finding Leadership

The process for a school to select a new committee chairperson begins with a discussion between the principal and the volunteer coordinator on who the next chairperson might be, which addresses these questions:

- **Is there anyone in the wings?**

Unfortunately, there often is no one readily available to assume the position, which weakens both the volunteer

program and the development effort. On important committees such as development, marketing, finance, or long-range planning, future chairpersons should be continually identified and encouraged (see Chapter V on delegation as a form of training). Additionally, the school may want to institute the practice of having a chairperson-cochairperson structure for major committees, in which the cochairperson is trained as the incoming chairperson.

- **Is there anyone capable and willing?**

The data base will help the principal and the volunteer coordinator determine this answer. Job skills and past volunteer experience will indicate capability but not necessarily willingness. Personal contact with the prospective leader will determine the volunteer's interest. The principal and the volunteer coordinator (or whoever is the best person to approach the prospect) will be attentive not simply to the school's need for a new chairperson but also to the volunteer's interests, concerns and expectations.

If the principal or the volunteer coordinator does not know the person well themselves, they might know that the person is a good friend of someone else, who might help determine the timing and particular approach best suited for this solicitation.

- **When and by whom?**

Whenever possible, chairperson positions should be filled before the general call for volunteers is issued. Employment or family circumstances may dictate when to ask someone to take a leadership role. A CPA will be less willing to respond positively in March than in May. A college teacher may not be willing to consider additional commitments during the last month of a semester.

The question of *who* may be more important than the question of *when*. A two-person team composed of someone who knows the volunteer position and someone whom the person cannot turn down should issue the leadership invitation. The job of the principal and the volunteer coordinator is to identify this contact person and solicit that special person's help in making the invitation.

Helping Volunteers to Say Yes

The potential chairperson will have a variety of concerns. Anticipating those concerns, the school's representative will be able to offer appropriate guarantees. When the donor is asked to volunteer time and talent in the performance of a specific task, the school must guarantee in return to

1. make the task worthwhile, challenging and fulfilling
2. provide training as well as records of the committees' functions
3. support the volunteer with the human, financial and material resources necessary to accomplish the task
4. give the volunteer the appropriate recognition
5. be responsive to the volunteer's recommendations and concerns

The prospective volunteer should ask, "How do I do this job?" The school helps to answer that question by maintaining an on-the-job manual that describes how to chair the committee. A person will be more willing to accept a commitment that is spelled out, because the job will appear manageable and the school will appear professional in its expectations and support of volunteers.

There is no magic formula in enabling volunteers to say yes. The reasons why each person actually volunteers are unique and personal. It may depend upon the kind of guarantees outlined above, or by whom and when the volunteer leader is approached. People also volunteer because they recognize the need, enjoy being close to children, or believe in Catholic education and in their particular school community. Their own parents may have provided an example of service, or they may want to be more informed or more influential in the school. Volunteers might value the resulting friendships and the degree of personal fulfillment from doing an important and professional job. The principal and the volunteer coordinator may not be sure which factors will determine a prospective donor's response, but they can do their research and come prepared in order to enable that person to accept the volunteer opportunity.

V. The High Art of Delegation

Although for some principals, board members and committee chairpersons it is simply faster and easier to do the job themselves rather than depend upon someone else, delegating is an integral component of an effective volunteer program.

The Benefits of Delegating

Delegating is that tool whereby the maximum number of resource people can be involved. It is at the core of a volunteer support process. Getting people involved is crucial to community building because it helps to expand their sense of ownership. Volunteers identify with the school and feel part of its working team.

On a practical level, delegating protects the people who tend to overextend themselves. More work is accomplished, more people are trained at a variety of tasks, and a better product is produced. Not only are there more bodies to attend to more details but also more talents and skills are incorporated into the end result. School leaders must see the necessity and wisdom of delegating and take the time necessary to let other people assume responsibilities. In delegating, the school leaders are believing that a group of people in this particular community can produce a better product together than any one individual, however talented that person might be.

A good example of the benefits of delegating can be seen when the principles of delegation are applied to writing a case statement, the backbone of a school's written communication program.[5] The school appoints a core committee of three to four people, consisting of the primary writer and others who help the writer in brainstorming, editing and doing legwork. As this ad hoc committee becomes com-

fortable with the case statement draft, it circulates the draft to a variety of groups in a carefully prescribed order. First, five or six planning and development volunteers read the case statement and make comments on content and form. The core committee then revises the draft and sends it out to key individuals outside the development committee for their critical comments. The core committee continues to distribute and revise the draft until board members, pastors, alumni, teachers, parishioners and donors all not only review the draft but also discuss, formulate and articulate ideas about the school's history, identity and future.

This process of case writing brings important results. First, the product reflects a consensus of ideas by key people in the school—it speaks for the community. Second, it educates people to the uses and importance of the case statement. Third, it has involved many more people than the original four committee members, which means that perhaps sixty people are now involved and therefore share in ownership of this document. Finally, the product reflects the wisdom and talents of a broad base of people.

The case writing example illustrates the benefits of delegating. Almost every volunteer task can be designed using a similar process in which more people are involved in a specific job. The key word is "designed"—planning the procedure will ensure that the process is implemented.

Designing the Procedure

The example of delegation by an ad hoc committee for the case statement applies to standing committees as well. The marketing committee will provide an excellent example of what might typically be done. A list of the goals and objectives for the marketing committee incorporates the following projects in accordance with the school's long-range plan:

- publicity and public relations
- recruitment and retention
- written communication
- Catholic Schools Week

This same list can be viewed not as goals and objectives but as a structural description of the marketing committee. According to such a description, each of these tasks becomes a subcommittee with its own subcommittee chair-

person and subcommittee members. Now the picture looks like this:

- Marketing Committee:
  Bridget, chairperson
- Publicity and public relations subcommittee:
  Maria, chairperson
- Recruitment and retention subcommittee:
  Mel, chairperson
- Written communication subcommittee:
  Simeon, chairperson
- Catholic Schools Week subcommittee:
  Gale, chairperson

Using delegation in this structural way enables the school to address a wide variety of concerns at the same time. Each year subcommittee chairpersons will recruit two or three additional people on their subcommittees. During the course of the school year, Marie, Mel, Simeon and Gale will be in charge of their particular projects. They will not be overwhelmed by their tasks, because they are not working alone, nor are they assuming the entire marketing burden. Bridget may fill in as a subcommittee member wherever she is needed, but her job is to oversee the entire committee and keep the subcommittee chairpersons, the board, the principal, the volunteer coordinator, and other major school committees informed. She will also be responsible for scheduling a full committee meeting every two months to review the activities of the full committee and help brainstorm, problem solve and support what everyone else is doing. Maria, Mel, Simeon and Gale are very involved and interested in marketing, have on-the-job training in a specific task, are not overburdened and are members of a functional team.

Now let us extend the hypothetical situation to the end of the school year. By this time, Bridget has completed her two-year commitment to chairing the marketing committee. She has four prospects (the subcommittee chairpersons) in the wings who are educated about the marketing process and capable of assuming her position. If, for instance, Gale becomes the chairperson for the full committee, one of her subcommittee members is now trained to assume her position as subcommittee chairperson. Delegating ensures that many more people are not only trained for a particular

job but also are prepared for the next leadership position.

Within the structure of an annual giving campaign, the same principles of delegation apply. In *Steps in Direct Solicitation: Preparation, Presentation and Follow-up,* Sister Mary Tracy, SNJM, begins the outline of the annual fund with the selection of campaign leadership. She emphasizes, "Leadership for the annual giving campaign is the key to the difference between an adequate campaign and an extraordinary one."[6] She is not talking about paid staff but carefully identified and selected volunteers who act as general and section chairpersons. Her point is critical: When schools hire development personnel, an essential feature of the job description is understanding the contributions that volunteers make to the program. Paid staff must see volunteers as professional colleagues and appreciate that the success of the program requires a shared sense of ownership. What is true on an elementary school level is equally true for high schools, both of which must raise thousands of development dollars each year: A full and dedicated community effort guarantees superior results.

Delegating is so important to a volunteer program that school leaders should consider restructuring the entire committee flowchart to ensure that the benefits are realized schoolwide. No one volunteer should feel isolated in any job. Umbrella committees can be formed to incorporate odds-and-ends positions, so that every task fits into the broader structure and all volunteers clearly understand their place on the team.

Delegating enables leaders to realize the fruits of community building throughout their volunteer base. By serving on committees, volunteers

1. share responsibility by working as a team
2. understand their assigned tasks and the overall objectives of their committee
3. see their committees function within the larger context
4. are gradually trained in a job and prepared for future leadership positions

It is a process that works best when it is implemented throughout the volunteer organization, beginning with the principal and the volunteer coordinator.

VI. Designing Professional Practices

When school leaders talk about training volunteers, they usually think of training in a particular task. Much of a volunteer's time, however, involves people skills as well as job skills. Committee chairpersons and board officers spend many hours communicating with a variety of publics; thus, volunteer training must address leadership skills as well as job capabilities.

The Importance of Tactics

The key to a task- and people-oriented training program is the design and implementation of carefully defined "tactics." That is, the school adopts calculated practices that are uniformly followed by all volunteers, no matter who is principal, volunteer coordinator, development director or school board president. The specifics of each tactic will depend on the school's philosophy and unique situation. What is crucial is that the tactics are in place, explained, clearly understood, and uniformly carried out. Defining and explaining these tactics should be done in an orientation or in-service (see Chapter VIII, "Orientations, In-Services and Recognition").

The Role of Committee Chairpersons

The position of committee chairperson is essential to the smooth running of school business and offers a unique opportunity for personal growth. Chairpersons, through their clear understanding of the purpose and objectives of their committees, direct the successful completion of the

school's short-term and long-range goals. Support of each chairperson begins with clarifying just what his or her role is. Chairpersons have the following responsibilities:

1. to communicate between committee members and administration, staff and board members
2. to monitor the use of the committee's resources
3. to ensure that each committee member is involved in a position that suits his or her interests, time and skills
4. to provide committee members with appropriate feedback and appreciation (including recognition in school publications)
5. to schedule and plan committee meetings
6. to be familiar with the school's long-range plan and budgetary process
7. to be conversant with and use management by objective (MBO) principles as needed
8. to construct and monitor the committee's budget
9. to maintain the committee notebook and produce the annual evaluation (see Chapter VII, "Stewardship and Accountability")
10. to identify and recruit new members

Agendas and Minutes

In addition to these general requirements, chairpersons must also master nuts and bolts items. Committee agendas and minutes are not exciting topics, but they are procedures that play a vital part in the effective running of committees and in the communication flow between volunteers and administrators.

Although they may seem formal, agendas allow for the most efficient use of time by organizing business, allocating minutes per item and specifying the time of adjournment. They also enable the chairperson to achieve a particular purpose by thoughtfully constructing a specific sequence of business items. For instance, if there is a topic scheduled for discussion that may involve a pronounced difference of opinions among committee members, when that item is scheduled on the agenda may influence the response of members, the spirit of the evening, and even subsequent results. Agenda writing is a talent; the skill of knowing how to use it for a specific purpose can be passed on from more experienced volunteers to new ones.

Minutes are a critical communication vehicle. As meeting times become more flexible to suit the needs of volunteers and as committees are restructured into subcommittee groups that meet separately, the principal will not be able to attend most meetings and will come to rely on committee minutes to know exactly what is happening throughout the volunteer structure. Minutes should also be circulated among committee chairpersons, for instance, between leaders of the marketing and the development committees. Finally, minutes should be written for future volunteer reference. Cryptic outlines will not be intelligible to future volunteers.

To do a professional job, chairpersons need to follow established practices for the format and content of agendas and minutes, and distribute them to specific people (committee members, the principal, the board president and other chairpersons). The volunteer coordinator (with input from committee chairpersons) can select the most readable, clear and informative format as a model for all of the committees.

People Skills

Many chairpersons will welcome training in facilitating a meeting, expanding ways to include every committee member in the discussion, clarifying and refocusing issues, and dealing with a member who tries to dominate the meeting. In an orientation setting, the past experience of long-time volunteers can be shared to help new leaders anticipate and solve problems.

Basic MBO skills also can be reviewed during an orientation. The MBO process involves the following steps:

Step I. Summarize the goal or intent: What is the school trying to accomplish in light of its mission statement and in relation to its committee structure?

Step II. Specify more detailed objectives: What is to be accomplished? When and how will it be measured?

Step III. Outline the plan of action: What people, materials, money and time will be needed, and who will make the necessary decisions? Is there an alternate plan for emergencies?

Step IV. Define controls: How will success or failure be predicted midway through the project? Are there measurements for standards of performance and vehicles for feedback from everyone who should react?

Step V. Create a standard of evaluation: How will leaders evaluate the completed project? Were the resources well managed and utilized? Did the MBO process itself work well?

In addition to MBO and group dynamic skills, techniques such as brainstorming and buzz sessions can be explained or demonstrated. The following chart shows the similarities and differences of each:

	Brainstorming	**Buzz Sessions**
What is it?	Activity to generate ideas	Same
When to use it?	Three to ten people	Groups larger than ten
How does it work?	People give ideas rapidly, later rank them	Same, only in small groups that reconvene later
What are the benefits?	Produces many ideas quickly, gets people talking and thinking, allows everyone to participate	Same

Policies and Procedures

Each school has its hidden secrets, which most volunteers learn by default. The school should communicate the policies and procedures regarding the following:

- **Secretaries**

  Outline what the office staff can or cannot be asked to do.

- **Copier**

  If volunteers have access to the school copy machine, show them how to use it. Chairpersons should budget for copy expenses if their committee will be billed for paper. If the school prefers that larger jobs be sent out, business and billing procedures should be outlined.

- **Computer**

  Explain who has access to the school computer, when it is available and what data can be entered or extracted.

- **Calendar**

  The school calendar is used to reserve both dates and rooms. Volunteers need to know who keeps the calendar and where, and also if there are facilities that are reserved through the parish center. Define also the time frame for setting events in the school calendar.

- **Parent newsletter**

  The parent newsletter is an excellent vehicle to announce meetings, request help, announce coming events and express appreciation for a job well done. Chairpersons need to know deadlines and procedures for submitting material.

- **Quarterly newsletter**

  Use this more formal publication to acknowledge volunteers for their service and achievements. Again, chairpersons need to know deadlines and procedures.

- **The school serving as mail carrier**

  Committee correspondence might be delivered home to parents by their children through the school office, a practice that is very convenient and saves on postage costs. Again, policy and procedure must be clarified.

- **School stationery**

  The school supplies letterhead, envelopes and thank-you cards. Committees that use large quantities of these items may need to submit orders and handle costs. Letterhead that lists the board or development leaders should be used by specific committees.

- **Light table**

  Volunteers should know if the school owns a light table used to lay out publications, where it is maintained and when it is accessible.

- **Using students in projects**

  School policies regarding the conditions under which students can participate in fund-raising events will have an impact on committee plans and objectives. These policies

address the use of class time to support special projects like setting up chairs for a school event or drawing pictures for the Christmas thank-you letter.

- **School personnel**

  Volunteers should be informed about what can be requested of the custodian and the other school personnel. For instance, the art teacher may be willing to offer his or her expertise, or the school's secretary might type notices. Policies regarding staff assistance must be clearly understood by volunteers.

- **School equipment**

  The availability, scheduling and use of the school's sound system, stage lights, VCR, wide-screen television, and other equipment should be limited to those volunteers who have been trained to use them.

- **Building security**

  Chairpersons are responsible for opening the building for committee members and guests, overseeing cleanup, and ensuring that the building is secure. Volunteers need to know who has access to school keys and on what basis, as well as when and to whom they must be returned.

- **Solicitation of donations**

  The school must communicate policies about requesting financial support or contributed services. If it does not do this, the development director's solicitation could be thwarted by the committee member's initiative to get a project underwritten. For example, a volunteer might ask a printer to donate a $120 print job, but the development director had planned a $1000 contribution request. The printer may say the work was the donation. Communication and coordination are critical.

- **Record of donations**

  The school also establishes procedures so that it is informed about individuals who either paid for or donated a service or item. The procedures ensure that the person will be thanked, the contribution acknowledged publicly and the record established in the development office. (Chapter VII expands the topic of finances within the context of stewardship and accountability.)

These kinds of procedures play a critical role in the smooth running of committees. Volunteers can learn as they go or use trial and error, but this wastes time and effort and will leave the school laboring with a poor communication process and, ultimately, unhappy volunteers. The alternative is to plan and define uniform practices tailored to the desires and needs of both the school and the volunteers.

VII. Stewardship and Accountability

As part of the school's policy of sound business management, volunteers must be responsible not only for successfully completing tasks but also for managing committee budgets and being accountable for school resources. Written procedures regarding finances and the use of school materials need to be given to all volunteers. These practices should be outlined during an initial orientation (see Chapter VIII, "Orientations, In-Services and Recognition") and also included in the volunteer handbook. Most importantly, these practices must apply to everyone equally. Paid and volunteer staff should be treated as professionals; they are accountable for the resources at their disposal as well as to the school's standard of excellence.

The Committee Notebook

Requiring committee chairpersons to maintain a notebook enhances the accountability and continuity of their work. The notebook is a how-to manual that should include the following items:

1. a description of committee responsibilities
2. a calendar for the jobs and routine procedures, and their projected costs
3. an inventory of equipment and materials
4. a list of members' names, positions, addresses and phone numbers
5. a record of expenditures and a list of donated materials and their approximate value

6. committee minutes
7. copies of correspondence
8. names and phone numbers of contact people
9. diocesan and school board policies applicable to the committee
10. a year-end evaluation and financial report

The notebook should be transferred from the outgoing chairperson to the incoming chairperson, and can be stored in the volunteer center (see Chapter IX, "Administrative Checklists"). Some chairpersons prefer to maintain two notebooks, so that they can keep records for their own reference and hand on the other copy.

The Year-end Evaluation

The year-end evaluation, which is part of the notebook, serves as the annual report from the committee to the school administration. It should be submitted to the appropriate people along the chain of command. The evaluation should contain

1. a summary of the committee's goals and objectives and how they were met
2. an analysis of the achievements and difficulties of the committee
3. a description of the role of individual members
4. recommendations for the coming year and a projection of expenses

Attached to the evaluation should be the budget report, which contains the total amount budgeted, projects listed chronologically with the detailed cost of each, and a total of the funds used during the school year. If materials or services were donated, the items and values should be noted. What was donated one year may need to be budgeted another year, and must be acknowledged by the school this year. The committee notebook and the year-end evaluation are the direct responsibility of the chairperson. But each committee's stewardship effort is only a part of a larger whole. Volunteers need to know how each committee fits into the overall budgetary process, so that they can be responsible stewards. When volunteers are professional in their financial record keeping, the entire school is administered more effectively, the development office is kept in-

formed of donors and contributions, and benefactors are acknowledged.

The School's Operating Budget

The highest priority and the largest single item in a school's budget is salaries and benefits. The next most important area of funding is the instructional program. Committee budgets are also part of the financial obligation of the school. To minimize increases in the cost per student, funding requests from committees should cover only essential projects.

Other Avenues of Funding

In addition to subsidy and tuition income, volunteers should understand what portion of the budget comes from development (annual giving, planned giving and income from endowment funds), fund-raising, grant writing and investment opportunities. If the committee's requests cannot be funded in full within the operating budget, avenues of alternate funding might be available and should be investigated through the development office.

Responsible Stewardship

In their accountability to the school in the handling of funds, volunteers need to

1. operate within their budgets
2. submit funding requests for the coming year based on accurate records of past expenditures and an itemized projection of future events and their costs
3. report any surplus before the end of the school year

In turn, it is important that the school allow volunteers to have a part in the budget formation. As donors, volunteers must be given a voice in the goals and tasks of their committees.

Volunteers need to know the decision makers, budget request deadlines and steps in the approval process. Their understanding ensures a realistic budget and good stewardship.

Document Costs

Committee chairpersons are responsible for documenting costs for their projects and for approving expenses incurred by committee members. As part of the end-of-the-year evaluation, chairpersons maintain an expense grid, such as one that lists projects vertically down the left-hand side of the page and each month of the school year horizontally across the top of page (see Appendix D, "Committee Budget Grid"). As expenses are incurred, the grid is filled in, including totals for each month and for the year at the bottom of the page.

Ideally, before volunteers are reimbursed or issued a check for a specific expense, they submit a check request form through the committee chairperson. There are always emergencies and extenuating circumstances, but the procedures for both the rule and the exceptions should be clear to everyone. If the invoice is mailed directly to the school office, the chairperson may never see the bill. A phone call to alert the secretary to watch for a particular statement will ensure that the correct committee is charged and that the chairperson can record the exact amount. If there are questions about charges made to a committee, the chairperson should ask to double-check his or her records with the school's ledger.

Establishing procedures for accountability is an important part of a support program. It enables the principal to administer more effectively and guarantees that the school practices stewardship.

VIII. Orientations, In-Services and Recognition

One of the most vital means of support for a school's volunteer base is a planned, thorough and consistent education program. Such a program will involve various forms of training for volunteers: orientations, in-services, workshops, even institutes and conventions. These opportunities should be offered to both new and experienced volunteers.

The bulk of the education program can be done in-house. In fact, it is preferable that the principal, the volunteer coordinator and volunteer leaders conceive, organize and implement such offerings for several reasons:

- First, the school's own leaders are better equipped and more apt to tailor information to their particular situation.
- Second, an in-house event dispels the perception that certain responsibilities are so difficult or specialized that only the elite can master them.
- Third, volunteers capable of sharing their expertise deserve the opportunity not only to serve the community in this way but to develop their own leadership skills.
- Finally, in-house events enhance community.

Orientations

At the beginning of each school year, board and committee members should be invited to a volunteer orientation scheduled under the auspices of the school board. The word "invited" here really means "required": The orienta-

tion should be mandatory for chairpersons and board members. Committee members should be encouraged to attend as well, because they are the chairpersons and board members of the future.

This volunteer orientation is separate from an orientation for board members. The purpose of a volunteer orientation is to prepare committee chairpersons for the coming school year, bringing everyone together to achieve a unified focus. Clearly, the same agenda cannot be offered year after year, since many of the attendees will be the same. If the school has never offered a volunteer orientation, however, the first session should be general in focus and include the following items (see also Appendix B):

1. a reading and discussion of the school's philosophy and mission statements
2. a description of some of the outstanding features of the school program
3. a presentation of school policies, particularly the policies and regulations governing committees and their functions
4. the general goals of the administration, faculty and board for the coming year to give volunteers a sense of the larger picture and an understanding of what the school's priorities are for the next nine months
5. the procedures for preparing agendas, running meetings and writing committee minutes
6. a flowchart delineating the committee structure and how the committees are connected to each other and to the school board, faculty and administration, with an accompanying narrative
7. a general discussion of the role of committee chairpersons, as well as the length of terms and the appointment procedure
8. a synopsis of the school's recent history (going back five years) to give new volunteers an understanding of the big picture
9. an explanation of the budgetary procedures and the tactics of accountability

Presenting and discussing the school's philosophy and mission statements to volunteers is a priority. Many of them are not familiar with these documents that are so important

in the day-to-day functioning of the school. Moreover, if a volunteer is "married" to the mission, it will be easier for him or her to value each task, maintain a professional focus, and achieve consistent involvement and faithful participation.

Because volunteers act as public relations representatives of the school, they also need to be articulate about the school's academics, faith dimensions and service components. They should know in general terms the profile of the student body and the faculty.

The Volunteer Handbook

The volunteer handbook gives a complete detailing of the topics covered in the orientation. This handbook, compiled at minimum cost by the volunteer coordinator, serves as a reference for committee members and chairpersons, board members and administrators. Because of the volume of information and the necessity to be clear and complete in descriptions, the handbook will contain much narrative. Avoid the temptation, however, to single-space everything; instead, make the material appear inviting and intelligible by having sufficient white space and variation in format.

Appendices will help clarify the text without interrupting the flow of ideas. Information that changes from year to year can be put in the appendices, so that the main text of the handbook remains intact over a longer period of time. Enclosures could include the following: flowcharts of committee and board structures, the chart of account numbers for committee income and expenses, a copy of the expense grid that chairpersons will use to track their expenses, diocesan and school policies that pertain to the functioning of committees, and a list of committee chairpersons with addresses and phone numbers.

Finally, each handbook should be organized and distributed in a binder to allow for future additions, updates and changes. Volunteers are worth this special effort. Furthermore, the orientation and handbook are examples of the school's professional standards. (See Appendix C.)

Varying the Focus

The agenda for subsequent orientations addresses other needs perceived by the school leadership. For instance, the orientation for the second year might be focused on building a communal calendar for the school year and

involve faculty and committee chairpersons either separately or jointly. As each committee chairperson outlines the goals and objectives for the year, someone fills in a calendar that covers the wall. Each committee is color coded. Once the calendar starts to fill, volunteers can perceive conflicts and overlaps in resources. This simple exercise provides a service to the chairpersons as well as educates everyone to the many projects going on throughout the school.

In-Services

Most groups within the school community need continuing educational support, or in-servicing. Administration, faculty and board members all benefit from this practice, but volunteers have a need for ongoing support as well. They, too, are professionals trying to do a successful job for the school. Because of the turnover of committee and board personnel, there will always be a sufficient number of new people to merit a detailed study of a given issue. Even for experienced members, such a review can rejuvenate their commitment and clarify their understanding.

The timing of regular in-services may pose problems for chairpersons and board members, who are busy enough without scheduling one more meeting. Nevertheless, they will be the first to recognize the merits of this type of support. If they are unable to meet on their own on a regular basis, there are several alternatives for scheduling:

1. sessions before monthly board meetings that are open to all volunteers
2. sessions at other times during the month offered both during the evening and repeated during the day to accommodate various work schedules
3. a special bulletin that is written and distributed to volunteers on a monthly basis

Subjects for In-Services

In-service topics fall into two major categories: inspirational and instructional. Inspirational in-services provide spiritual nourishment and community building, and may be offered as retreats or social events, as well as formal in-services. A group of students might present a prayer service or excerpts from the document *To Teach As Jesus Did* as a lead-in to a discussion about the mission of Catholic

education. Another possibility would be a presentation by a teacher that describes the school's incorporation of peace and justice in the curriculum.

The instructional in-service addresses two major areas: familiarizing volunteers with specific facets of the school program and explaining the total planning and development process. Often parents do not see the entire school picture; they are familiar only with their children's classes. Various faculty members can present the total profile of the religion, reading or computer curriculum. These short but comprehensive overviews will increase the volunteers' enthusiasm and make them better spokespersons for the school.

Volunteers must understand the importance of the planning and development programs. To help volunteers see the total picture here, in-service organizers can rotate particular topics such as the school quarterly newsletter, investment opportunities, recruitment goals, the annual fund, the planned giving program and the school marketing plan. Appendix E offers ideas on designing in-services on planning and development.

It is also worthwhile to research local in-service opportunities. Universities and professional organizations hold relatively inexpensive seminars on a variety of subjects, from writing grant proposals and case statements to community building exercises.

There are also other possibilities for local opportunities—the ones created by school leaders themselves. Schools within the same diocese can come together and address common concerns. As members of a larger community, the Church, schools can support each other in many ways. Collaboration benefits all Catholic schools.

Recognition

A responsible and sensitive program of volunteer recognition, as other tenets of volunteerism, grows out of the school's mission. Just as careful planning goes into appropriate appreciation of financial donors, the school consciously and continually acknowledges each volunteer's gift of time and talent.

Volunteer appreciation practices include the following:

- **Thanking volunteers**

Volunteers are thanked personally and often. A handwritten note from the pastor or principal is always appreciated,

but the faculty and students can also be involved in making thank-you cards or writing notes to acknowledge volunteer efforts. The volunteer coordinator makes sure that the principal, pastor and faculty know both the public and hidden accomplishments of volunteers.

- **Highlighting volunteer contributions**

The school should establish ways to showcase the many contributions of volunteers. The parent newsletter, the school's quarterly newsletter, the alumni newsletter, the parish bulletin and the diocesan newspaper are just a few of the vehicles available. Special announcements at alumni reunions or parish functions are also excellent ways to thank volunteers. Such public acknowledgement can focus on the volunteer staff in general or feature individuals deserving of special recognition.

- **Hosting yearly events**

Yearly events such as an appreciation luncheon can be coupled with a school liturgy. Such occasions express gratitude to volunteers, bring many members of the community together and include everyone in the limelight.

- **Gifts**

Committee chairpersons should allot a small percentage of their budget for volunteer gifts.

The possibilities for organized support of volunteers in the form of orientations, in-services and recognition practices are as varied as the needs that demand such means of support. Every school will discover what works best as it continues in planned efforts to encourage and support volunteer involvement for the mutual benefit of the school and the volunteers.

IX. Administrative Checklists

The Principal's Role

The decision to establish a volunteer support program begins with the school principal. The principal makes the initial choice to delegate authority and responsibility to volunteers. Additionally, the principal will play a crucial role in developing policy in five vital areas:

- **Volunteer coordinator**

  The principal will determine whether this position should be filled by a current or new staff member, or by a volunteer. The principal will also establish the working relationship between himself or herself and the coordinator, so that the chain of command is clear to all.

- **Five-year plan**

  The school's commitment to a planned volunteer support program is reflected in a specific section of the long-range plan. The principal should direct the school board in this enterprise.

- **Computers**

  Computerization makes tasks easier and more accurate, such as updating the five-year plan, tracking alumni records, producing a variety of mailing lists on short notice and sending out annual giving bills.

  Computers will enable the school to track volunteers' jobs and skills, and follow up on volunteer commitments. The choice to invest in suitable software is important, equally so are the policies that will address such issues as who will have access to the program, who will maintain data and produce reports, and who will be able to use the

development and marketing mailing lists. The principal and the school board must anticipate potential problems and formulate policies early on to avoid misunderstandings or, worse yet, be guilty of omission in this crucial area.

- **Volunteer center**

A volunteer center may meet several needs in the support program, and the principal may choose to authorize such a facility. A center gives volunteers a place to work away from the already congested school office. If an extra copier is donated to the center, it will free the office copier and allow volunteers maximum utilization of their time.

The center also provides a central location for a volunteer resource file. This file is a library of minutes, reports, records and year-end evaluations produced and collected by committee chairpersons and made available to the full body of volunteers. Samples of all written communication pieces (five-year plans, case statements, newsletters and brochures), copies of articles, church documents and resource materials that volunteers can check out are also kept on file. The center can be maintained by the volunteer coordinator.

- **Budget**

The principal or finance officer is the key individual, along with the finance committee chairperson, in formulating the initial draft of the operating budget. If committee chairpersons are told that they will be consulted in the budgetary process, then they must be consulted. The principal or the finance officer enforces policies regarding check requests and reimbursements.

The Role of the Volunteer Coordinator

The role of the volunteer coordinator complements the efforts of the principal. The coordinator works on a daily basis with volunteers and has no job except to meet the needs of volunteers, who are donating their time and talent to the school. General responsibilities will center around the following concerns:

- **Attracting volunteers**

This process will require research, record keeping and strategies to achieve the maximum involvement of volun-

teers. Specific emphasis will be given to recruiting parents during registration, alumni during class reunions and parishioners during the parish's annual call for ministers, as well as working with chairpersons to identify and involve future leaders.

- **Training volunteers**

This category includes orientations and in-services, which the coordinator organizes. Volunteers can receive further training through community offerings, and conventions or institutes funded by the school or parish.

- **Using volunteers**

The volunteer coordinator will train and support volunteers. His or her careful delegation of tasks and responsibilities throughout the entire committee structure prevents volunteer burnout. By prioritizing needs, maintaining records and communicating among committees, volunteers will achieve professional results while gaining a sense of teamwork. How the volunteer program works is as important as what is achieved, and community building is an essential part of the volunteer effort.

- **Appreciating volunteers**

The local community sees the many donations of time and talent as signs of the school's identity and mission. The volunteer coordinator helps the school express the virtue of *caritas* by finding opportunities to give credit where credit is due, thanking volunteers and acknowledging their accomplishments. Of all the rewards of volunteerism—professional experience, leadership training, a sense of accomplishment, friendship, belonging to a community—being recognized for that unequaled gift of self is perhaps the most gratifying. "See how they love one another."

Appendices

Appendix A: Time-in-Lieu-of-Payment Policies

Some schools are using time-in-lieu-of-payment policies. In establishing such policies, schools fix a required number of hours at a set wage per hour for each family. Parents report their volunteer time each month on an honor system basis. At the end of the year, families falling short of the required number of hours pay the difference; those who do not fulfill the requirements either with time or money are not allowed to register for the coming year.

There are many variations of this basic format. Some schools that have adopted Fair Share Tuition have incorporated volunteer time as part of their philosophy of stewardship. Schools can also specify that time donated to the parish counts as volunteer time to the school. There are situations that limit required volunteer time to student services including computer support, library, teacher aide, hot lunch and playground supervision. Other schools have extended required volunteer time to development and fund-raising, going so far as to privilege those areas in light of pressing school needs. Some schools have a substitution option, whereby grandparents or other relatives can donate time as part of the family's requirement. This is especially helpful to single-parent families.

Principals who oversee these programs emphasize the importance of respecting the limited family time available to parents, yet balancing that concern with the necessity and desire to incorporate parents as active volunteers and increase their sense of ownership and involvement.

Appendix B: Checklist for a Volunteer Orientation

School leaders can choose from the following topics for their initial volunteer orientation. They should schedule the same orientation twice, once during the day and once in the evening, to accommodate volunteers' employment situations.

I. Background information

Philosophy and mission statements
School policies
Goals of the five-year plan
Governance model

The school's benefits from volunteer involvement:
-Improved academic programs and expanded enrichment opportunities
-Stable cost per pupil
-Higher retention level because of increased involvement
-Community building

Research findings about Catholic education
Unique qualities of Catholic schools
Highlights of this parochial school

Faculty and student profile
The profile of the school's volunteer base
Identifying volunteers' interests and talents
How to invite others to volunteer
Need for ongoing training, orientation and in-service
What happens after experienced volunteers move on

Overview of the program
Coordinating volunteer activities

How responsibility is shared
How volunteers are part of decision making
How the school expresses appreciation

Computer support for committee chairpersons
Communication among committee members and between committees
Diocesan wide resources

II. How to Proceed

Responsibilities of committee chairpersons:

___ Developing agendas

___ Organizing meetings

___ Encouraging leadership

___ Writing minutes

___ Using MBO principles

___ Making school resources available to volunteers

___ Building community on a committee level

Stewardship and good order:

___ Maintaining standards of quality

___ Knowing the chain of command

___ Keeping committee notebooks

___ Evaluating at the end of the year

___ Following budgeting process

___ Tracking expenses

Appendix C: Sample Content for a Volunteer Handbook

The volunteer handbook is an essential feature of a comprehensive volunteer support program and a useful tool to complete and/or complement an initial orientation. The following is the table of contents from the handbook used at Cataldo Catholic School, Spokane, Washington.

Cataldo Catholic School Philosophy. ..... page 3
Cataldo Catholic School Mission Statement ..... page 3

I. *The Place for Volunteers at CCS* ..... page 4

II. *The "How To's" of Committee Involvement.* ..... page 5
- A. The Role of Committee Chairpersons ..... page 5
- B. How to plan a Meeting ..... page 5
- C. Making meetings more effective ..... page 6
- D. Taking minutes ..... page 7
- E. Group Dynamics ..... page 7
  - 1. Working with people ..... page 7
  - 2. Brainstorming and buzz sessions ..... page 7
  - 3. Networking among committees ..... page 8

III. *Use of CCS Resources* ..... page 9
- Secretaries ..... page 9
- Copier ..... page 9
- Computer ..... page 9
- Calendar ..... page 9
- Newsnotes ..... page 9
- Interschool correspondence ..... page 10
- School stationery ..... page 10
- Hospitality committee ..... page 10
- Light table ..... page 10

IV. *The Budgeting Process* ..... page 11
- A. How the budget is formulated ..... page 11
- B. Being financially responsible ..... page 11
- C. Creative funding ..... page 11
- D. Role of committee volunteers ..... page 11
- E. Budget time-line ..... page 11
- F. Documenting costs ..... page 12

V. *Written Communication* ..... page 13
A. Image building ..... page 13
B. Quality control ..... page 13
C. Mailings ..... page 13

VI. *Keeping the Record Straight* ..... page 14
A. Committee notebooks ..... page 14
B. Year-end evaluation and budget report .. page 14

VII. *Appendices* ..... page 15
A. Board members (name, position, address, phone) ..... page 15
B. Committee chairpersons (name, position, address, phone) ..... page 16
C. Flow chart ..... page 17
D. Committee chart of accounts (income and expense codes) ..... page 18
E. MBO outline. ..... page 19
F. The Christian discernment model. ..... page 20
G. Committee expense grid ..... page 21
H. School policies regarding committee functions ..... page 22

Appendix D: Committee Budget Grid

Committee Expense Grid

Committee _____ Account No. _____

Chair _____

School Year _____

Budget $ _____

Itemized Expenses	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST
Total Expenses $												

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Appendix E: In-Service Program on Planning and Development

An ongoing planning and development process is both critical to the future and riddled with special problems all its own. Even if schools invest in consulting support, paid and volunteer staff will eventually be responsible for the maintenance and improvement of the planning and development effort. With the continual turnover of board and committee members, the need to sustain a working knowledge of the pieces of the program along with a vision of the total picture is a serious challenge to school leaders. The following suggestions can help meet this need for continual education.

Many planning and development consultant firms that work with Catholic institutions produce their own newsletter (usually published on a quarterly basis) that contains in written form much of the material expanded upon during on-site consultation. These firms provide their newsletters for a minimal subscription rate to schools that are not currently clients.

By using resources such as volumes of these newsletters and by accessing NCEA publications on development, a school can design a series of in-services that discusses and places efforts within the larger context of the total development concept. This type of in-service, done on a ten-month schedule from September to June, enhances volunteers' understanding, broadens their participation and strengthens the overall direction of the school's financial future. Such a program requires a minimum of expense and offers a maximum return.

These in-services can include both board and committee members. Initiated by the principal and board president, the presentations can feature the development director or chairperson, board officers, and experienced committee members. Another approach may be to assign different topics to current chairpersons who are closely involved with that particular enterprise and encourage them not only to expand their personal understanding but also become "the expert" in that area.

It may be wise to model the first presentation—that is, to use the September in-service not only as the initial session but as the representative format for the other in-services to follow. This requires that the first speaker be selected very carefully. Each presentation can be 10 to 15 minutes long, with a discussion period of equal duration immediately following.

These in-services are based on how-to materials. The purpose is not to train participants in the art of solicitation or grant writing but to summarize the main pieces of the overall process and to emphasize how each piece fits together. Even volunteers who play key roles in the planning and development process (for instance, the editor of the school newsletter) may not be aware of the intricacy and integrity of the total school effort. Ideally, school leaders will understand what they do and why, or even realize that additional features should be incorporated into their program.

References

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2. National Conference of Bishops, *To Teach As Jesus Did* (Washington, DC: United States Catholic Conference, Inc., 1973) paragraphs 118, 103.

3. Pope John Paul II, *On the Family* (Washington, DC: United States Catholic Conference, Inc., 1981) 39.

4. "Creating Effective Volunteer Programs," from the Diocese of Pittsburgh's *Marketing/Communications Handbook.*

5. Richard J. Burke, "Preparing an Effective Case Statement," *Catholic School Management Letter,* vol. 5, no. 2, (Sept. 1983).

6. Mary Tracy, SNJM, *Steps in Direct Solicitation: Preparation, Presentation and Follow-up* (NCEA: 1990) 4.

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